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METAL CAN REQUIREMENTS

We give you below a tabulation by the nine principal breakdowns of the actual shipments of metal cans during 1944 and estimated requirements for 1945.

| | (Tons of Steel) Shipments 1944 | (Tons of Steel) Requirements 1945 | (Tons of Steel) 1945 Requirements Civilian | (Tons of Steel) Non-Civilian | (Tons of Steel) Increase of 1945 Requirements over 1944 shipments |
|---------------------------|--------------------------------------|---|--|---------------------------------|--|
| (1) Fruits and Vegetables | 1,067,444 | 1,072,131 | 619,870 | 452,261 | 4,687 |
| (2) Dairy Products | 347,194 | 411,193 | 171,876 | 239,317 | 63,999 |
| (3) Meats | 139,504 | 213,925 | 74,227 | 139,698 | 74,421 |
| (4) Fish | 99,428 | 108,976 | 63,000 | 45,976 | 9,548 |
| (5) Military Rations | 95,892 | 139,205 | --- | 139,205 | 43,313 |
| (6) Fats & Oils | 29,000 | 30,952 | 11,674 | 19,278 | 1,952 |
| (7) Special Commodities | 49,000 | 164,792 | 45,481 | 119,311 | 115,792 |
| (8) Grain Products | 40,917 | 80,946 | --- | 80,946 | 40,029 |
| (9) Non-food cans | 203,653 | 250,000 | 100,000 | 150,000 | 46,347 |
| | 2,072,032 | 2,472,120 | 1,086,128 | 1,385,992 | 400,088 |

Special Commodities include such items as coffee, cocoa, sugar, baking powder, salted nuts, dessert powder, honey, syrups, and yeast (mostly military items).

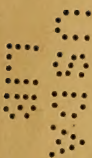
Grain Products include such items as cereals, flour, and beer (all military items).

We believe that the following comments are pertinent and may be of value.

1. The estimated 1945 requirements for fruits and vegetables are substantially unchanged from actual 1944 requirements. 1944 was what we consider a reasonably good year in that crops were neither unduly high nor unduly low. We therefore believe that the estimate for 1945, based on actual 1944 shipments, may be considered to be very reasonable.

2. The increase in dairy products is due almost entirely to an expected increased pack of evaporated milk between 9,000,000 and 10,000,000 cases, and the increased use of the heavier export style can for Military and Lend-Lease requirements. Estimated requirements for the Military and Lend-Lease in 1945 are 45,000,000 cases as compared with approximately 30,000,000 cases in 1944.

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3. The increase in the meat requirement is due entirely to Military requirements. Military meat requirements are now so large that virtually no meat will be packed for civilian requirements at least until the second half of the year.
4. The small increase in the fish pack requirement is due to the return of more boats to the fishing industry. This increase will be more than offset by increased Military requirements, with the result that the civilian pack will be less than last year.
5. The Military rations are, of course, entirely a firm Military requirement.
6. The requirement for fats and oils is approximately 50/50 Military and civilian, but the increase is due largely to increased Military and Lend-Lease requirements as there is only a small increase for civilian requirements.
7. The increase in the requirements for special commodities is due virtually entirely to increased Military requirements. The major commodities which the Military wish packed in this category are spices, salted nuts, coffee, dessert powders, baking powder and peanut butter.
8. The grain products item is entirely Military, principally beer, cereals and flour.
9. The non-food item - present indications are that in view of the Military requirement for non-food cans, which is larger than last year, the basic requirement for non-food cans for the first half of the year should be somewhat in excess of last year's requirement.